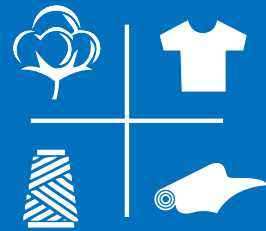


M. P. TEXTILE NEWSLETTER

THE MONTHLY NEWSLETTER OF
THE MADHYA PRADESH TEXTILE MILLS ASSOCIATION



Chairman:
Shri Shreyaskar Chaudhary;
Vice Chairman:
Shri Siddharth Agrawal;
Dy. Chairman:
Shri Subhash Jain

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ASSOCIATION NEWS

1. The Association has submitted its suggestions for Pre-Budget Memorandum 2026-27 to the State Government on 26th November, 2025. Our suggestions include:

- Reduction of Mandi Tax on cotton to Rs. 0.50 per Rs. 100;
- Rebate of Rs. 2.00 per unit in Power Charges for Textile Industry at par with Gujarat and Maharashtra;
- Fees payable by establishments for the consent from Paryavaran Vibhag to operate water/air should be on depreciated value of net investment on the date of application;
- Exemption from Provisions of National Building Code, Since the Factories Rules already provide for such provisions;
- Conversion of industrial Leased Land to Free Hold;
- Provision of sufficient funds for release of Industrial Promotion Assistance to Member Mills.

RAW MATERIALS

1. As per International Cotton Advisory Committee (ICAC) press release dated 3rd November, 2025. World cotton lint production for 2025-26 is estimated at 25.4 million tonnes, nearly unchanged from the previous season, surpassing global consumption by 392,000 tonnes, Global trade fell 7.4 % to 9.1 million tonnes in 2024-25, mainly due to a 65 % decline in China's imports, offsetting gains elsewhere.



Tariff escalations have reshaped trade flows and forecasts, with lingering impacts expected into coming seasons. For 2025-26, global cotton area is projected at 30.4 million hectares, with yields averaging 835 kgs. per hectare—slightly above the decade average. Consumption will continue to be led by China (32%), followed by India, Pakistan, Bangladesh, and Turkiye, together accounting for 76 % of global use. Cotlook A Index for 2025-26 in the range of 62–91 cents per pound, with a midpoint of 74 cents, based on current supply and demand conditions.

2. The USDA Report dated 14th November, 2025 on Global cotton production in 2025-26 has been released. Upland price for 2025-26 is lowered to 62 cents per pound. The 2025-26 outlook for world cotton supply and demand in November shows higher production, consumption, trade, and stocks compared to the September outlook. Global cotton production is

forecast 2.4 million bales higher with increases of 1 million bales in China, about 900,000 bales in the United States, and 500,000 bales in Brazil. World trade is raised 300,000 bales and consumption 50,000 bales. Beginning stocks are raised over 400,000 bales largely reflecting updated 2024-25 trade data for several countries. As a result of these changes, global ending stocks are raised about 2.8 million bales to 75.9 million.

Quantity in Mn. of 480 Pound Bales

World	2023-24	2024-25	2025-26
Opening Stock	73.41	73.41	74.49
Production	112.98	112.98	120.08
Consumption	114.98	119.04	118.88
Export/Import	44.34	42.43	44.00
Closing Stock	73.41	74.49	75.93

3. The Cotton Association of India (CAI), has released on 11th November, 2025 its first estimates of State -wise Cotton output for the 2025-26 season starting October, 2025, which are as under:

Quantity in Lakh Bales of 170 Kgs. each

State	2024-25	2025-26	Change
Punjab	1.50	2.00	0.50
Haryana	8.05	7.00	-1.05
Rajasthan	20.00	21.50	1.50
Gujarat	77.00	72.00	-5.00
Maharashtra	91.00	88.00	-3.00
Madhya Pradesh	19.00	19.00	0.00-
Telangana	48.75	43.00	-5.75
Andhra Pradesh	13.25	17.00	3.75
Karnataka	24.00	25.00	1.00
Tamil Nadu	4.00	4.50	0.50
Odisha	3.85	4.00	0.15
Others	2.00	2.00	0.00
Total	312.40	305.00	-7.40

Thus the estimates of cotton production for season 2025-26 are lower as compared to those of 2024-25.

The estimates of consumption, Imports, exports and closing stocks, etc. are as under:



Quantity in Lakh Bales of 170 Kgs. each

Particulars	2024 - 25	2025 - 26
SUPPLY:		
Opening Stock	39.19	60.59
Production	312.40	305.00
Import	41.00	45.00
Total	392.59	410.59
DEMAND :		
Mill Consumption	210.00	210.00
SSI Consumption	89.00	80.00
Non - Mill Use	15.00	10.00
Export	18.00	17.00
Total	332.00	317.00
Closing Stock	60.59	93.59

However, as per Ministry of Agriculture & Farmers Welfare release dated 26th November, 2025 cotton production in this season is estimated at 292.15 lakh bales.

4. India's cotton fields are undergoing a quiet yet powerful transformation. At the heart of this change is the \$68 million (Rs 600 crore) Kapas Kranti Mission, launched by the Government of India to boost long-staple cotton production, empower farmers and strengthen the nation's textile industry. Announced in Hyderabad, Telangana, by Union Minister Shri G. Kishan Reddy, the initiative aims to bring science, technology, and innovation to every stage of cotton cultivation — from seed to sale — ensuring farmers are better equipped, better compensated, and more productive. It is a blueprint for rural transformation, focused on improving productivity in India's cotton-growing regions through high-density plantation (HDP), precision irrigation, and scientific agronomy.

5. Cotton procurement by the Cotton Corporation of India (CCI) has gained momentum, with daily purchases crossing one lakh bales of 170 kgs. as market arrivals gather pace across major cotton-growing States. Total procurement so far has reached roughly fifteen lakh bales, even though arrivals began later than usual in the current season, which officially started on 1st October, 2025. CCI's buying activity has accelerated in recent days as kapas prices in the private market continue to rule below the Minimum Support Price (MSP). Seed cotton (kapas) is currently trading at nearly Rs. 7,250–7,500 per quintal in Gujarat, significantly lower than the MSP of Rs. 8,110 (long staple), widening the gap and increasing the scope for Government intervention through MSP operations.

According to industry sources, arrivals will reach to two lakh bales and CCI has been procuring across all cotton-growing states except Odisha. Last year, CCI procured over one crore bales of 170 kgs. each.

POWER

1. The M P Power Management Company has advised DISCOMs to bill to the consumers Fuel & Power Purchase Adjustment Surcharge (FPPAS) @ minus (-) 2.33% on energy charges only for one month commencing from 24th November, 2025



MANPOWER

1. The State Government has published in the MP Gazette on 14th November, 2025 the Factories (Madhya Pradesh Amendment) Act, 2025. By this amendment Sections 54, 55, 56, 59 and 65 of the Act have been amended to allow:

- Working for up to 12 hours a day inclusive of interval for rest, subject to maximum of 48 hours a week as under:
 - More than 9 hours per day for 6 days/week;
 - More than 10 hours per day for 5 days/week;
 - More than 11.5 hours per day for 4 days/week.



- However, rest of days after working 48 hours in a week, will be paid holidays for the concerned worker.
- The overtime hours in a quarter will be restricted to 144 hours.
- Working above 48 hours will be paid at double the normal rate.

2. The Ministry of Labour & Employment has issued four Notifications regarding implementation of the Labour Codes with effect from 21st November, 2025:

- Code on Social Security 2020 ;
- Industrial Relations Code, 2020;
- Occupational Safety, Health and Working Conditions Code-2020;
- Code on Wages-2019: Sections 1 to 41 Section (4) to (9), Sections 43 to 66, Section 67 (1), Section 67(2) (a) to (r) and (u) to (zc) and Section 67 (3) to (5), Section 68 and 69.

LEGAL & TAXATION

1. In exercise of powers under Section 18A read with Section 157 of the Customs Act, the Board of Indirect Taxes and Customs has issued:



- Notification No. 70/2025-Cus. (N.T.) dated 30th October, 2025 to Introduce the Customs (Voluntary Revision of Entries Post Clearance) Regulations, 2025. Regulations prescribing the manner and conditions for carrying out revision contemplated under Section 18A.
- Notification No. 68/2025-Cus. (N.T.) dated 30th October, 2025 - Identifies the Deputy/Assistant Commissioner of the concerned Commissionerate as the proper officer for the purpose of carrying out verification as necessary in case of applications made under the Regulations.
- Notification No. 71/2025-Cus. (N.T.) dated 30th October, 2025-Prescribes certain exceptions which bar an application for revision from being entertained under Section 18A of the Customs Act.
- Notification No. 69/2025-Cus. (N.T.) dated 30th October, 2025 - Provides that every application for revision shall be accompanied along with a fee of INR 1000/-.

The aforementioned notifications have come into effect from 1st November 2025. Circular No. 26/2025-Cus. dated 31st October, 2025 provides the guidelines for giving effect to these notifications.

EXPORT & IMPORT

1. According to the quick estimates data released by the Ministry of Commerce & Industry on 17th November, 2025. Exports of textiles and apparel contracted 12.91% from \$3,061.54 million in October, 2024 to \$2,666.41 million in October, 2025. In the aftermath of the 50% tariffs, the garment and textile exporters reported requests by US buyers for steep discounts, cancellation or postponement of orders and reduction in order volumes.



- Exports of cotton yarn/fabrics/made-ups, handloom products etc. from India decreased by 13.31 % and Manmade yarn, fabrics and Made-ups by 11.75 % in October, 2025 over October, 2024.
- During April-October, 2025, cotton yarn/fabrics/made-ups, handloom products registered a negative growth of 4.18 %.
- During October, 2025, Textiles Exports registered a negative growth of 12.92 % over the October, 2024, while Apparel Exports registered a negative growth of 12.88 % during the same time period.
- During April-October, 2025 Textile Exports registered a negative growth of 3.54 % over the same period of previous year, while Apparel Exports registered a growth of 1.13 % during the same period.
- Overall T&A registered a growth of 1.57% during April-October, 2025.

The information relating to textile and apparel exports during the period April-October, 2025 as compared to exports in same period of the previous year is as under:



Value in US\$ Million

Exports	Apr.-Oct. 2024-25	Apr.-Oct. 2025-26	% Change
Cotton Yarn, Fabrics, Made-ups & Handloom Products	6,995.20	6,702.85	(-)4.18
MMF Yarn, Fabrics, Made-ups, etc.	2,843.65	2,787.39	(-)1.98
Jute Products	212.65	213.70	0.49
Carpets	892.54	857.42	(-)3.93
Handicrafts, etc.	1,050.29	1,008.03	(-)4.02
Textiles	11,994.33	11,569.39	(-)3.54
Apparel	8,733.72	8,832.56	1.13
Textiles & Apparel	20,728.05	20,401.95	(-)1.57
All Commodities	2,52,660.98	2,54,253.90	0.63
%Share of T & C	8.20	8.02	

2. India also witnessed 83.26 % rise in imports of cotton (raw and waste) in October, 2025 compared to October, 2024. During October, 2025, imports of Textile yarn, Fabric, Made-ups dropped by 1.17 % compared to October, 2024. The details of imports in April-October, 2025 as compared to the same period of previous year are as under:

Value in US\$ Million

Imports	Apr.-Oct. 2024-25	Apr.-Oct. 2025-26	% Change
Cotton Raw & Waste	605.09	910.73	50.51
Textile Yarn, Fabrics, Made-ups, etc.	1,426.36	1,543.67	8.22

3. Some of the large export markets for India which clocked impressive growth rates were UAE (14.5%), UK (1.5%), Japan (19.0%), Germany (2.9%), Spain (9.0%) and France (9.2%). On the other hand, some of the other markets that recorded higher growth rates were Egypt (27%), Saudi Arabia (12.5%), Hong Kong (69%) etc. These 111 markets contributed USD 8,489.08 million during April– September 2025, compared to USD 7,718.55 million in the previous year— reflecting a 10% growth and an absolute increase of USD 770.3 million.

4. As per GTRI, India's exports of textiles and apparel to the US fell 37 % from \$ 944 million to \$ 597 million during May-September 2025. Garments were down 44 %, home textiles 16 %, and yarn and fabrics 41 %.

5. The Directorate General of Foreign Trade (DGFT) has issued a Circular on 11th November, 2025 clarifying that Export Obligation Discharge Certificates (EODC) should not be withheld for Advance Authorizations affected by the erstwhile Rule 96(10) of the CGST Rules for imports between 13th October, 2017 and 9th January, 2019, provided other requirements are met, where

- IGST was paid in cash at import clearance,
- The applicant did not avail exemptions from IGST, Compensation Cess or other levies (except Basic Customs Duty), or
- The applicant complied with the pre-import and procedural conditions. The clarification follows prior policy changes and a Supreme Court direction permitting refunds or ITC, where admissible.

STATE OF INDUSTRY

1. According to data released by the Ministry of Statistics and Programme Implementation (MoSPI) on 1st December, 2025, India's industrial production growth improved to 0.4 % in October, 2025. IIP for the manufacture of textiles was down by 2.4 % in October, 2025 as compared to October, 2024. IIP for wearing apparel was down by 6.1% in October, 2025 as compared to same month of last year. The details of IIP for the period April-October, 2025-26 as compared to those of same period of 2024-25 are as under:

Items	For the Month		Cumulative		Growth Apr.-Oct. 2025-26
	Oct. 2024	Oct. 2025	Apr.-Oct. 2024-25	Apr.-Oct. 2025-26	
General	150.3	150.9	149.5	153.6	2.7%
Textiles	111.1	108.4	108.2	107.3	(-)0.8%
Wearing Apparel	104.0	97.7	111.9	112.3	0.4%

2. According to ICRA excess rains, US tariffs and penalties, and an unfavourable base owing to the shift in the festive season weighed on India's economic growth in October, 2025 and affected the performance of the core output, which was flat year on year (YoY) in the month after expanding by 3.3 % in September. The YoY growth in economic activity, as measured by the ICRA business activity monitor, eased to a 14-month low of 5.9 % in October from 8.3 % in September this year.



3. The Ministry of Textiles, Government of India, has issued the operational guidelines for the Textiles Focused Research, Assessment, Monitoring, Planning and Start-Up (TEX-RAMPS) Scheme, vide Office Memorandum dated 26th November, 2025. TEX-RAMPS is a Central Sector Scheme with 100% funding from the Government of India, aimed at strengthening the textiles and apparel sector through targeted research, data-driven planning, enhanced statistical systems, sectoral capacity building, and support for innovation and start-ups.

4. The Union Cabinet, chaired by Hon'ble Prime Minister Shri Narendra Modi, has approved the Export Promotion Mission (EPM) — a flagship initiative announced in the Union Budget 2025–26 to strengthen India's export eco-system. The Mission aims to make India's export framework more inclusive, digitally driven, and globally competitive, especially benefitting MSMEs, first-time exporters, and labour-intensive sectors. The EPM will be implemented with a total outlay of Rs. 25,060 crore covering Financial Years 2025–26 to 2030–31.

Key Components of the Scheme:

- NIRYAT PROTSAHAN**
 - Focuses on financial enablers to improve access to affordable trade finance for MSMEs.
 - Includes measures such as interest subvention, export factoring, collateral guarantees, credit cards for e-commerce exporters, and credit enhancement for market diversification.
- NIRYAT DISHA**
 - Focuses on non-financial support to enhance export readiness.
 - Covers export quality and compliance, branding and packaging, support for trade fairs, logistics and inland transport reimbursement, and capacity building.

Implementing Agency: Directorate General of Foreign Trade (DGFT).

All operations — from application to approval and disbursal — will be conducted through an integrated digital platform linked with existing trade systems.

The Mission consolidates major export promotion schemes such as the Interest Equalisation Scheme (IES) and the Market Access Initiative (MAI) into a unified, outcome-based framework.

5. On 12th November, 2025 the Ministry of Chemicals and Fertilizers (Department of Chemicals and Petrochemicals) has, in public interest and after consultation with the Bureau of Indian Standards (BIS), rescinded earlier Quality Control Orders (QCOs) relating to petrochemical and polyester-based products, which include 100% Polyester Spun Yarn (Grey & White), Polyester Industrial Yarn (IDY), Polyester Staple Fibre (PSF), Polyester Continuous Filament Fully Drawn Yarn (FDY), and Polyester Partially Oriented Yarn (POY). These orders have been withdrawn with immediate effect, except in respect of actions already taken under the previous notifications.

6. On 18th November, 2025 the Ministry of Textiles has in consultation with Bureau of Indian Standards rescinded the earlier Quality Control Order in respect of Viscose Staple Fibre with immediate effect, except in respect of actions already taken under the previous notification.

7. On 13th November, 2025 the Ministry of Heavy Industries has deferred the implementation of Machinery & Electrical Equipment Safety (Omnibus Technical Regulation) Order, 2024 indefinitely. It was earlier scheduled to be implemented from 1st September, 2026.

8. The Ministry of Finance vide Press Release No.2189390 notified Credit Guarantee Scheme for Exporters (CGSE) for providing 100% credit guarantee coverage by National Credit Guarantee Trustee Company Limited (NCGTC) to Member Lending Institutions (MLIs) for extending additional credit facilities up to Rs.20,000 crore to eligible exporters, including MSMEs.

9. The Reserve Bank of India vide its Circular dated 14th November, 2025 issued Trade Relief Measures Directions, 2025 under which it has provided following relief measures:

- Moratorium on payment of all instalments (Principal and Interest) falling due between 1st September and 31st December, 2025. Accrued interest during moratorium deferment period may be converted in to funded interest term loan, which shall be repayable after 31st March, 2026 but not later than 30th September, 2026.
- Recalculation of 'drawing power' by reducing the margins and /or reassess the working capital limits during the effective period. These measures are applicable to HSN 57, 61, 62 and 63.10.

The Confederation of Indian Textile Industry (CITI) has urged the Reserve Bank of India to add spinning, weaving and processing units also to the list of "eligible sectors" for the RBI's Trade Relief

11. The Ministry of Textiles approved 17 new applicants under the Production Linked Incentive (PLI) Scheme for Textiles in Round 3 of selection. This move is set to accelerate investment, boost domestic manufacturing, and enhance India's global competitiveness in the Man-Made Fibre (MMF) Apparel, MMF Fabrics, and Technical Textiles sectors. The approved applicants have committed a total investment of ₹2,374 crore (\$261.14 million). The proposed projects are expected to achieve projected sales of over ₹12,893 crore generating employment for about 22,646 persons in the coming years.

12. Ms. Neelam Shami Rao, Secretary, Ministry of Textiles, Government of India, underlined that India's textile sector is entering a phase where sharper product focus, diversified markets and stronger manufacturing capabilities will determine its next level of growth, while noting that both Central and State Governments are expanding supportive schemes to enable this transition. She shared these perspectives at an interactive meeting jointly hosted by PDEXCIL, TEXPROCIL, MATEXIL and CMAI on 14th November, 2025. She stated that the journey from USD 180 billion to USD 350 billion must be led by the industry itself, with the Government remaining in a facilitative role. Schemes will continue to evolve based on emerging requirements and within the resource capabilities of the Government.

13. India's textile industry has broadly welcomed the Government's rollout of four new labour codes with industry leaders noting that the reforms are likely to improve productivity, strengthen competitiveness and ease compliance burdens for manufacturers.

A key provision drawing widespread support is the decision to allow women to work night shifts, which would enable factories to run more efficiently and boost production, especially in sectors such as apparel where the workforce is predominantly female. Exporters also stated that enhanced productivity would make Indian garments more competitive in global markets.

Industry bodies highlighted measures such as single registration, single licence and single return for employers, as well as the introduction of an inspector-cum-facilitator framework, saying these would significantly improve the ease of doing business.

14. India's latest decision to open an anti-dumping investigation into Chinese polyester textured yarn follows a sharp rise in low-priced imports. Across discussions last week, sourcing leaders framed this shift as policy-driven pricing rather than pure market behaviour. Meanwhile, the official data shows that higher United States tariffs pushed India's textile and apparel exports down about 13 per cent year on year in October. These pressures coincide with tightening sustainability rules. The European Union's updated Strategy for Sustainable and Circular Textiles, released this month, reaffirms 2030 as the deadline for all textiles sold in the bloc to meet strict durability, repair and recycling requirements, with measures phasing in from 2026.

15. At the meeting of the Board of Directors of Cotton Association of India held on Saturday, the 15th November 2025, Shri Vinay Kotak has been elected as President and Shri Bhupendra Singh Rajpal as Vice President for the next term.

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10. The Reserve Bank of India has issued another Notification on 13th November, 2025 which permits:

- The period for realization and repatriation of full export value of goods, software, and services has been extended from the existing 9 months to 15 months from the date of export.
- The permissible period for shipment of goods against advance payments has been increased from 1 year to 3 years from the date of receipt of such advance or as per contract terms, whichever is later.

For Address